

ABSTRACT OF THE DISCLOSURE

A financial services outsourcing method or system facilitates a direct service provider's ability to outsource financial services to numerous ultimate clients. The financial services are outsourced to an outsourcing group abroad. Ultimate client specific financial files and corresponding reference materials are loaded onto a remotely accessible part of a host server located in the United States. The host server provides access to a remote client computer of information concerning the ultimate client specific financial files and corresponding reference materials. The access may be limited to limited screen shot access. Outsourced personnel are retained to perform financial service projects (e.g., prepare individual tax returns) for ultimate clients of direct financial services firms. The outsourced personnel perform the financial service projects while located outside the United States. The status of the financial service project is monitored and reported.